

BLS SCHOLARS & FELLOWS RETENTION TASK FORCE
Wednesday, June 21, 2023 @ 2-3 p.m.
Boca Raton Resort & Club – Amalfi Room

Agenda

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|------|---|----------------------------|
| I. | Call to Order and Welcome | Stephen Sandiford |
| II. | Approval of January 25, 2022, Meeting Minutes
(Attachment A) | Zach Hyman |
| III. | Reminder – Mission Statement and Goals
(Attachment B) | Stephen Sandiford |
| IV. | Review Results of Surveys | Stephen Sandiford /Members |
| V. | Reimbursement Policies
(Attachment C) | Zach Hyman |
| VI. | Other Matters for Discussion/Good Order | Members/Judge McEwen |
| VII. | Adjourn | Stephen Sandiford |

ATTACHMENT A

Minutes of the Scholars and Fellows Task Force Mid-Year Meeting

The Scholars and Fellows Task Force (the "Task Force") met on January 25, 2023.

At the inception of the meeting, the Task Force approved the September 2022 meeting minutes and reiterated the goal of the business law section and the pro bono mission.

After introductions, the Task Force provided a reminder of both the Task Force's Mission and expected deliverables.

1. To paraphrase the language of the EC Minutes of Sept. 2017 and June 2018, our Mission is two-fold: (i) to review and study why the Section is not getting fellows/students to continue attendance after their fellowship term and after law school and (ii) to address the challenges faced in retaining Fellows and Scholars.
2. Our goals are to collect, study, and evaluate survey metrics in an attempt to identify why many of the Scholars and Fellows have chosen not to remain active in the Section and then to seek out ways to address those concerns. We will, therefore, survey past Scholars and Fellows to discern the reasons for attrition and then develop a "playbook" or handbook for combating attrition, with tasks assigned to designated committees and committee leadership.

The Task Force discussed and ultimately finalized categories of questions as well as a shortlist of actual questions to be incorporated into the surveys to be submitted to former Scholars and Fellows. The categories are level of past participation, financial concerns, convenience in attending, perceived intangible benefit, and some open-ended questions to flesh out some of the latter categories. These categories are intended to identify the reasons why Scholars and Fellows are not participating in the process.

The Task Force agreed to circulate the draft surveys with questions to the Task Force membership for review and sign-off, whereupon, the Task Force will arrange the surveys to be sent to former Scholars and Fellows.

There were also suggestions that the Scholars and Fellows be required to participate more actively in substantive committees and that there be mechanisms to ensure accountability. Membership in the BLS should be a requirement for participation, for example.

The Task Force also discussed the current reimbursement policies of the Section relating to Scholars and Fellows and explored how the reimbursement policies affect the retention of Scholars and Fellows. Some members of the Task Force involved in Membership and IMF explained that there was insufficient funding for Scholars and

that Scholars were comped the cost of attendance (registration fee) at the Labor Day Retreat. Solutions to obtain more funding for Scholars, including limiting the number of Scholars were discussed. The Task Force also requested of other members of the Task Force who are in Membership Committee leadership to provide more clarity in disclosures to Scholars regarding what they can expect financially. The Task Force agreed to support Membership and IMF in securing more funding, once the amount of funding is clarified.

The Task Force voted to adjourn the meeting with the expectation that the survey be completed prior to the next meeting.

Scholars and Retention Task Force

January 25, 2023

Attendees

1. Judge Catherine McEwen
2. Zachary Hyman
3. Stephen Sandiford
4. Alejandra Iglesia
5. Giacomo Bossa
6. Marisol Cruz
7. Michelle Suarez
8. Jude Cooper
9. Amir Isaiah
10. Kayla Heckman
11. Zachary Needell
12. Adam Gilbert
13. Katherine Van de Bogart
14. Christina Taylor
15. April R. Martindale
16. Crystal Potts
17. Kelly Roberts

ATTACHMENT B

Mission Statement and Goals

Mission:

- To **review and study** why the Section is not getting fellows/students to continue attendance after their fellowship year and after law school. (Source: Minutes from EC meeting Sept. 2017)
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- To **address the challenges** faced in retaining Fellows and Scholars. (Source: Minutes from EC meeting June 2018)

Goals:

- Initial:

The Task Force is studying and evaluating metrics in an attempt to identify why many of the Scholars and Fellows have chosen not to remain active in the Section and then to seek out ways to address those concerns. (Source: Minutes from EC meeting Sept. 2018)

- Revisit reasons for attrition
- Develop a "playbook" for combating attrition

Remaining Tasks

Creating Retention Best Practices Handbook

- Sampling of general retention recommendations
- Prior recommendations
- Creation of Style Guide [new]
- Handbook outline in progress
- Compliance tracking tool

Proposed Two-Year Horizon Benchmarks (Developing a timeline for obsolescence)

- By Winter meeting 2023
 - Finalize survey tool
 - Obtain list of S/F alums from BLS admin
 - Furnish survey to S&F alums
- By Annual meeting 2023
 - Study survey results
 - Address new survey findings in corresponding Handbook section/new section
- By Retreat 2023
 - Draft Handbook
 - Consider proposed revisions
 - Prepare template communications required by handbook

- By Winter meeting 2024
 - Prepare template compliance tracking checklist
 - Adopt final version of Handbook
- Annual meeting 2025
 - Congratulate the task force and recommend dissolution

ATTACHMENT C

Current/Proposed Reimbursement Policies

As of June 2020, the \$2,500 annual stipend for the Fellows was increased to include the following waiver of the BLS registration fees for attending the following BLS events:

- (i) the Judicial Liaison Dinner (approximately \$150);
- (ii) (ii) the Annual and Mid-Year/Winter Luncheons (approximately \$75); and
- (iii) (iii) the Labor Day Retreat (approximately \$550).

Let me know if you have any further questions.

Thank you.

Ms. Mariane L. Dorris



BUSINESS LAW SECTION OF THE FLORIDA BAR

MEMBERSHIP COMMITTEE BUDGET REQUEST **TO BLS EXECUTIVE COUNCIL - FY 2023-2024**

Membership Committee Goals

1. Increase overall attorney membership in BLS

The mission of the Florida Bar Business Law Section Membership Committee is to recruit new members and to retain current members of the Florida Bar Business Law Section, to promote diversity and inclusion, and to promote participation in pro bono work by current and new members of the Florida Bar Business Law Section.

The Membership Committee also seeks to increase membership in the BLS in areas that are currently underrepresented, such as smaller Florida cities and in the Florida panhandle.

2. Increase future attorney membership in BLS through the Scholars Program

To recruit diverse future young lawyers and infuse them into our Section by providing an opportunity for them to learn, mingle and socialize with more seasoned members of BLS at the Labor Day Retreat; and to have them share their positive experience with others to encourage involvement with and membership in the Section.

MEMBERSHIP COMMITTEE FUNDING REQUEST FOR SCHOLARS PROGRAM AND OTHER MEMBERSHIP INITIATIVES

Membership requests a total sum of \$16,000.00 to be used during fiscal year 2023-2024, to accomplish its goals for the Scholars program and other membership initiatives outlined below. Membership Committee intends to allocate the \$16,000.00 as follows:

A. Scholars Program - \$11,000.00

SCHOLARS PROGRAM Goal and Objectives:

1. To have a maximum of twenty (20) law students from Florida's 12 law schools attend the BLS Labor Day Retreat each year as BLS Scholar "Ambassadors" of their respective law schools.

2. To encourage a diverse group of future young lawyers, and their peers, to join BLS by offering two (2) Scholar opportunities to each Florida law school per year; and
3. To include Scholars in educational and social events at the BLS Retreat to further the Membership and Inclusion Mentoring Fellowship Committees' goals of increasing diversity and growing future BLS members and leaders.

Qualifications and Requirements:

1. Each Scholar must be a full-time student in good academic standing at a Florida law school.
2. Scholars will be required to:
 - a. Attend at least two (2) substantive committee meetings
 - i. Scholars may split their time between two committee meetings during the same time period.
 - ii. Provided that Scholars must attend a total of two substantive meetings during two different time slots; and
 - b. Attend the Membership Inclusion/Mentoring/Diversity Committee meeting; and
 - c. Attend the Membership Committee's "First Retreat Meet-n-Greet."
3. Scholars must attend the above meetings in order to maintain their status as a "Scholar" and receive any financial benefits from the BLS and their respective law schools.
4. Each Scholar will be assigned to a BLS Fellow Mentor:
 - a. BLS Fellows, in addition to their other requirements in maintaining their two-year fellowships, will serve as mentors for the Scholars.
 - b. BLS Fellows must attend "First Retreat Meet-n-Greet" to introduce themselves to their designated Scholar.
 - c. BLS Fellows shall assist Scholars with their selection of the committees to attend.
 - d. BLS Fellows shall guide the Scholars in all social events and networking, to help ensure that Scholars enjoy themselves and have a positive experience at the Retreat.
5. Scholars must provide feedback from their experience at the Retreat through their BLS Fellow Mentor within a week after conclusion of the Retreat.

Budget and Costs:

1. Each Scholar will be entitled to a stipend totaling \$550.00, which will include the Student Rate of \$450.00 to register for the Labor Day Retreat and up to \$100.00 per student (see below) to cover additional costs on an "as needed" basis.
2. The Student Rate for the Labor Day Retreat will remain at \$450.00 per Scholar registrant, to be paid by BLS to the Retreat Committee [or as appropriate] from the BLS Fiscal Year's Budget as of July 1st.

3. Each student Scholar will be given a code with which to register for the Retreat. This Code will allow them to register and be eligible to book a hotel room. The Code will permit BLS to pay \$450.00 to the Retreat Committee for each Scholar's registration and will avoid the Scholars having to bear this cost up front, thereby removing the need to seek reimbursement from the Section.
4. Scholars will be responsible for securing their own travel and lodging arrangements, as well as all meals and incidentals not covered by the registration. To the extent possible, BLS or the Membership Committee will locate one or more alternative hotels that might offer a lower rate to Scholars while helping to ensure the BLS Retreat block hotel rooms will remain available for current BLS members and their families.
 - a. Law schools will be encouraged, but not required, to subsidize additional costs for the Scholar "Ambassadors," such as for transportation, meals and lodging.
 - b. Each Scholar may apply to Membership Committee for up to \$100.00 for reimbursement for out of pocket expenses to attend the Retreat, on a need basis and in the event the Scholar's law school does not subsidize such expenses.
 - c. Advertisement for the program will clearly state that BLS commits to cover only the \$450.00 Student Registration cost for the Retreat per Scholar, and that the value of the Registration is approximately \$1,300.00. BLS will not guarantee additional funds to any Scholar, other than the maximum of \$100, as set forth above.

Scholars Recruiting

1. At the June Annual Meeting applications shall open for the Scholars Program. Application period is July 1-August 1. Membership Committee, with assistance from BLS members, will solicit Law School Liaisons from each law school prior to opening the Application Period.
 - a. Membership Committee will solicit applications by sending to each law school a letter in substantially the form attached as **Exhibit A**, along with a flyer similar to that attached as **Exhibit B**.
 - b. Students shall apply to the Scholars Program using the Application Form attached as **Exhibit C**
2. Applications will be selected on a merit basis with preference given to students in 3L year.
3. Applications shall be selected fairly with each school having the opportunity to have two (2) student ambassadors present at the BLS Labor Day Retreat.
4. After the application period closes, and in the event a law school only submits one (1) Application, or does not submit any Scholar Applications, Membership Committee shall be permitted to accept more than two (2) students as Scholars from the other Florida law schools until the maximum number of Scholars (20) are accepted.

5. Students will be accepted into the Scholars Program using a letter in substantially the same form as **Exhibit D**.
6. BLS shall promote the scholars program using the BLS Scholars page and any other appropriate media.
7. In advance of the Labor Day Retreat, the Membership Committee will circulate the names, headshots, and resumes of the Scholars to attendees

B. Other Membership Initiatives - \$5,000.00

1. Membership Committee seeks to assist BLS committees and task forces with increasing BLS membership, whether via a survey of Florida Bar members (in- and out-of-state), or through other programs designed to locate practicing business law attorneys who are not members of the section.
2. Host membership events on behalf of the BLS in conjunction with local bar associations throughout the State of Florida.
3. Host membership events on behalf of the BLS in conjunction with all Florida law schools throughout the State of Florida.
4. Host membership events on behalf of the BLS in conjunction with the Federal bar associations throughout the State of Florida.
5. Produce BLS branded materials (such as pens, highlighters, hats, cups, etc.) to give away at various local, national, and educational meetings and events.
6. Reimburse reasonable travel expenses for Membership Committee, BLS Executive Council members, and others who are instrumental organizing in events that Membership may co-sponsor.